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Discount Store News®

THE NEWSPAPER OF THE DISCOUNT DEPARTMENT STORE INDUSTRY

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Woolco uses dramatic posters in its prototype's signing to promote "a new spirit in fashion." In November, sportswear endorsed by model Christie Brinkley (at right in inset) will hit Woolco stores. *(DSN photo)*

Discounters Eye $72.6B; Top 10 Gain

Nationwide DSN Report

The discount department store industry is projected to tally a 9% sales increase in 1982 to $72.6 billion, including food sales, according to *DSN*'s annual survey of the industry.

The gain, which will see sales in general merchandise hit $66.6 billion, comes in a year with the fewest ever new store openings and in a year that saw the top 10 chains take a larger share of total volume.

The number of stores operating during 1982 is 8,282, an increase of 118 units, and the number of chains is falling slightly to 259. Last year, there ere some 428 new stores opering.

The top 10 chains, lead by mart with sales expected to reach $18.4 billion, control 47.6% of the market or some $34.6 billion. Last year, the top 10 chains had a 45.6% share of the market, according to *DSN* estimates.

The projected increase may well end up on the conservative side as first-half results come in much stronger than anticipated for some key chains.

Discounters are still sticking with their original forecasts made early in the year that pointed to a much revived economy for the second half.

Sales of general merchandise will hit $66.6 billion in 1982.

K mart outperformed Wall Street's expectations for the second quarter by reporting profits up 6.9%, the gain breaking a string of 10 consecutive quarterly drops. K mart is projected to have a sales increase

(Continued on page 128)

Latest Woolco Prototype Ups Apparel Decor

NEW YORK—The remodeling wheels continue to turn at Woolco.

Next month, the chain will have unwrapped 20 units in its new upscaled prototype format that puts a bigger-than-life focus on fashion and apparel presentation.

The prototype format was installed in the units during the course of the summer, including

(Continued on page 128)

Christie Brinkley Line Created For Woolco

By BETTY J. TAYLOR

NEW YORK—Move over Cheryl and Jonny, Christie's coming.

In the vein of in-house, private-but-status name brand labels developed by Sears with Cheryl Tiegs and K mart with Jonathan Logan, Woolco is emerging with a ladies' apparel program built around what it hopes will be the highly recognizable name (and fame) of model Christie Brinkley.

Brinkley, a model with the Ford agency in New York and the Nina Blanchard agency in California, is most noted for her recent *Sports Illustrated* summer swimwear poses.

Kayser-Roth, the New York apparel manufacturer responsible for both the Sears Tiegs and K mart Logan lines, is developing the Brinkley label.

While Woolco is mum on the subject, Brinkley's press secretary Fran Caciano said the "Christie" line of sportswear will hit Woolco stores in mid-November.

Sawdon & Bess advertising agency in New York, which is handling the account, said advertising—including an extensive television campaign—would break with the delivery. The agency wouldn't disclose at presstime the size of the account, but a spokesman said Woolco "has made a major commitment" to back the line, including eight-page color brochures and films for in-store

(Continued on page 128)

Catalogland Is Found Ripe For Expansion

NEW YORK—The catalog showroom industry has plenty of room to grow.

That's the basic conclusion of a 120-page study of catalogers, focusing on 11 publicly held chains that spark most of the industry's growth, released at presstime by Lehman Brothers Kuhn Loeb Research.

The key finding of the study is that "the catalog showroom industry is nowhere near saturation. In fact, there are 18 major metropolitan markets where there are no catalog showrooms at all."

The study lists the 20 most saturated metro markets and notes that in these areas "showrooms generate sales per household of $170 or more . . . (with) sales averaging $206 per

(Continued on page 127)

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Discount Store News®

THE NEWSPAPER OF THE DISCOUNT DEPARTMENT STORE INDUSTRY

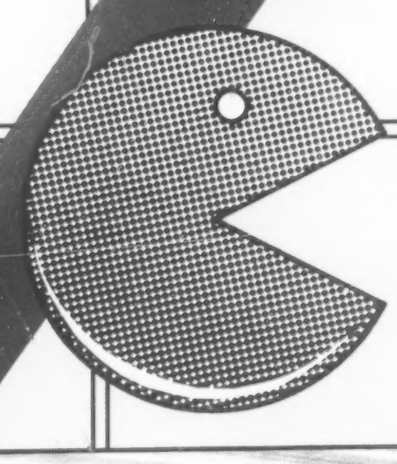
1982-83 DISCOUNT STORE CENSUS

State of the Discount Store Industry

	As of Calendar Year Ended 12/31/81	Projected for Calendar Year Ending 12/31/82
Square footage	576,215,000	583,911,000
Net Gain in Square Footage	30,124,000	7,696,000 (1.3%)
Stores	8,164	8,282
Net Gain in No. of Stores	428	118
Annual Sales Incl. Food[1]	$66.6 Billion	$72.6 Billion
General Merchandise Sales	$61.1 Billion	$66.6 Billion
Average Sales/Sq. Ft./Yr.[1]	$115.58	$124.32
Average Sales/Sq. Ft., General Merchandise	$106.04	$114.04
Average Sales/Store/Year	$8,157,766	$8,765,999
Average Store Size	70,580 sq. ft.	69,395 sq. ft.

[1] Includes supermarket sales, when under same roof, for calendar 1981, 1982.
(Source: DSN Research)

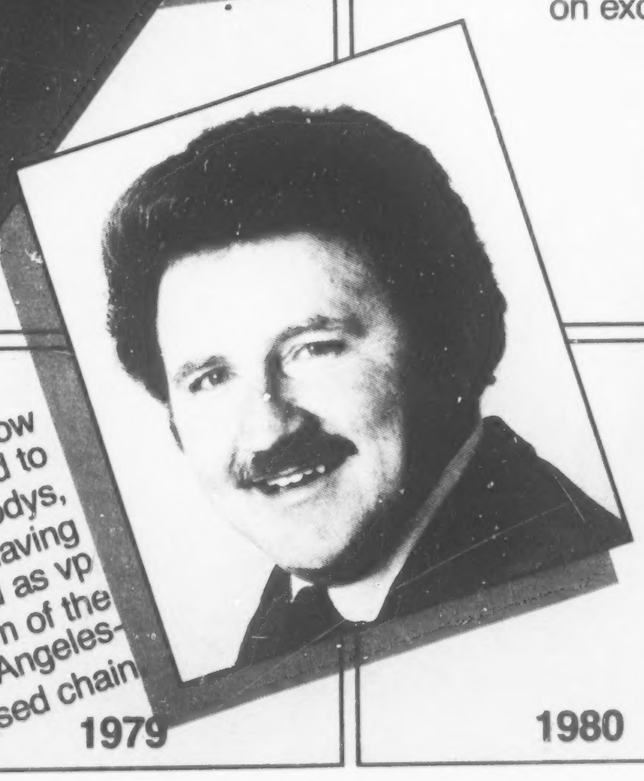
Harold Smith, former executive vp and gmm of Arkansas-based Magic Mart, moves up as president of Woolco.



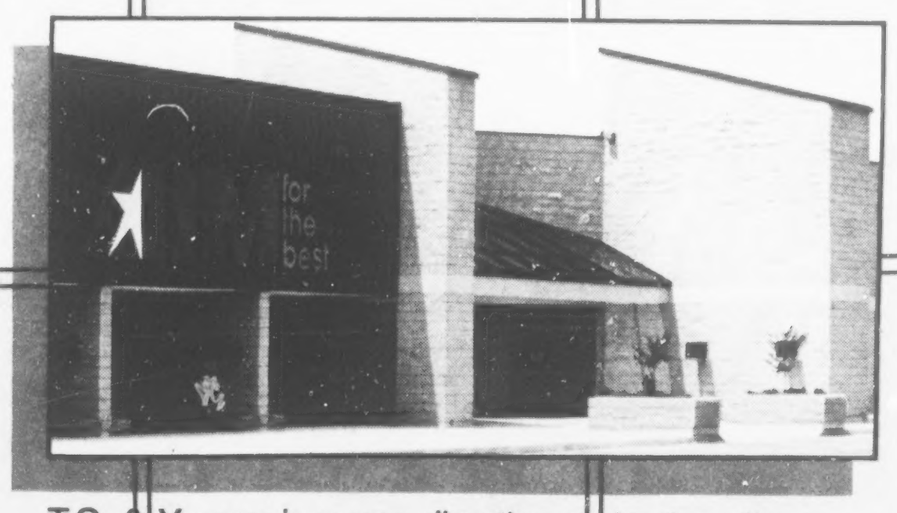
Licensed characters munch consumer dollars in almost every category from wearables to housewares.

K mart makes a change in its apparel approach, taking on exclusive rights to the Jonathan Logan label.

Target picks up along the way 33 California FedMarts to mark its entry into the state.



Frank Anslow is elevated to president of Zodys, after having served as vp and gmm of the Los Angeles-based chain.



T.G. & Y. goes in a new direction and spins off a new division, AIM for the best.

1978 1979 1980 1981 1982

$50 Billion $56 Billion $60.5 Billion $66.6 Billion $72.6 Billion

Total Volume (including supermarket sales)

Discount Store Census '82/'83

Projections For the $25 Million-Plus Club

Rank	Chain (HQ state in parenthesis)	Estimated Volume (in millions)			No. of Stores			Total Sq. Ft. (Add 000)		
		Proj. General Merchandise $ Current Fiscal Yr. (Including Leased Depts.)*	General Merchandise $ Previous Fiscal Yr. (Including Leased Depts.)*	Net Earnings in millions Previous Fiscal Yr.	1/82	12/82	To Be Added, 1983	1/82	12/82	To Be Added, 1983
1	K mart (Mich.)	18,435[a]	16,592	222.2	2,055	2,125	80	119,500	123,436	4,480
2	Wal-Mart (Ark.)	3,500	2,495	82.8	491	555	80	23,921	27,000	4,000
3	Target (Minn.)	2,398	2,054	108.7[b]	151	167	40	14,679	16,234	3,888
4	Woolco (N.Y.)	2,257[c]	2,145	(19.0)[b]	349	329	9	25,400	23,944	720
5	Gemco (Calif.)	1,922	1,780	—	86	92	6	9,518	10,184	660
6	T.G. & Y. (Okla.)	1,803	1,595	67.0[b]	553	574	8	19,104	20,240	750
7	Zayre (Mass.)	1,665	1,465	41.2[b]	258	266	8	18,200	18,800	600
8	Hills (Mass.)	910	790	—	93	100	—	7,440	8,000	—
9	Caldor (Conn.)	895	779	—	74	79	10	6,600	7,031	890
10	Bradlees (Mass.)	886	719	—	91	106	2	6,273	7,356	133
11	Meijer (Mich.)	848	800	—	48	49	—	5,860	5,930	—
12	Fred Meyer (Ore.)	720	600	—	65	68	3	5,650	6,000	450
13	Roses (N.C.)	700[d]	595	8.2	173	184	10	7,480	8,000	480
14	Venture (Mo.)	680	612	16.8[b]	44	47	—	5,335	5,544	—
15	Cook United (Ohio)	639	584	9.7[b]	118	119	—	6,712	6,756	—
16	Jefferson/Ward (Fla.)	600	550	—	51	51	—	5,410	5,410	—
17	Murphy's Mart (Pa.)	560	496	—	106	111	2	5,030	5,150	169
18	Zodys (Calif.)	536	419	—	48	55	3	2,757	3,069	174
19	Alexander's (N.Y.)	528	485	—	16	16	—	3,855	3,855	—
20	Gold Circle (Ohio)	500	397	—	36	50	1	4,352	6,000	—
21	Fedco (Calif.)	457	408	—	7	7	—	900	900	—
22	Ames (Conn.)	395	344	9.9[d]	110	118	10	4,262	4,534	350
23	Payless (Ore.)	825	758	16.7	143	146	5	4,290	4,370	130
24	ShopKo (Wis.)	376	337	—	32	36	—	1,900	2,137	—
25	Times Square (N.Y.)	364	325	—	14	14	—	2,300	2,300	—
26	Pamida (Neb.)	350	334	16.1[b]	173	168	4	3,456	3,472	120
27	Heck's (W. Va.)	350	272	—	96	122	—	4,386	5,573	—
28	Jamesway (N.J.)	346	305	4.2	64	68	4	3,660	3,907	232
29	Howard Bros. (La.)	334[e]	304	—	100	103	—	3,540	3,646	—
30	Richway (Ga.)	318	266	—	23	30	6	2,452	3,198	485
31	S. E. Nichols (N.Y.)	264	242	(0.4)	43	43	—	3,900	3,900	—
32	Grand Central (Utah)	255	236	1.5	32	32	—	2,024	2,024	—
33	King's (Mass.)	250[e]	741	(52.0)	182	116	—	11,151	7,381	—
34	ALCO (Kan.)	196	187	5.2[b]	80	81	3	2,378	2,405	81
35	Harts (Ohio)	194	178	—	23	25	—	1,610	1,750	—
36	Bi-Mart (Ore.)	190	168	—	26	30	3	780	900	90
37	Ann & Hope (R.I.)	188	168	—	4	5	1	750	930	—
38	Fishers Big Wheel (Pa.)	180	165	—	68	68	—	2,275	2,275	—
39	Clover (Pa.)	180	151	—	15	17	—	1,000	1,111	—
40	Danners (3D) (Ind.)	158	121	11.7[b]	34	35	—	1,525	1,553	—
41	Prange-Way (Wis.)	131	117	—	23	24	—	1,225	1,235	—
42	Gee Bee (Pa.)	130	120	3.9[b]	22	24	—	1,409	1,538	—
43	Quality Stores (Mich.)	125	114	—	25	25	—	750	750	—
44	Gaylords (N.J.)	124	118	0.5[b]	35	37	—	2,000	2,114	—
45	Value City (Ohio)	118	110	—	17	17	—	1,700	1,700	—
46	Magic Mart (Ark.)	117	112	—	48	48	—	1,536	1,536	—
47	Smitty's (Ariz.)	110	94	—	20	20	—	2,200	2,200	—
48	Rich's (Mass.)	105	94	—	12	12	1	740	740	62
49	Sky City (N.C.)	100	85	—	68	72	1	2,720	2,880	40
50	Modell's (N.Y.)	93	85	—	6	6	—	750	750	—
51	J. W. Mays (N.Y.)	92[e]	189	(0.1)	9	4	—	1,982	925	—
52	Gibson (Odessa, Tex.)	84	70	—	10	10	1	919	919	60
53	Maloney (Ky.)	81	58	1.5[b]	35	44	5	659	790	139
54	David's (Kan.)	80	74	(1.3)	8	6	—	491	360	—
55	G.I. Joe (Ore.)	70	60	—	7	7	1	385	385	55
56	The Fair (Mass.)	62	57	—	7	8	—	550	600	—
57	Swallen's (Ohio)	60	90	—	9	6	—	1,040	693	—
58	Van Leunen's (Ohio)	54	49	—	6	6	—	380	480	—
59	Click (Ohio)	51	45	—	9	10	—	1,075	1,195	—
60	Monte Mart (Calif.)	50	45	—	3	3	—	213	213	—
61	Laneco (Pa.)	50	46	—	13	15	—	1,200	1,314	—
62	J-Hawk (Tex.)	48	46	—	17	17	—	850	850	—
63	The Andersons (Ohio)	47	43	—	3	3	—	175	175	—
64	Grandpa Pigeon (Mo.)	47	44	—	5	5	—	315	315	—
65	Copps (Wis.)	44	42	—	16	16	—	960	960	—
66	Lee Shops (Mass.)	44	42	—	9	9	—	480	480	—
67	Giant Way (Mich.)	43	41	—	15	15	—	560	560	—
68	West & Co. (La.)	40	45	—	35	33	1	700	660	20
69	Valley Fair (N.J.)	39	38	—	2	2	—	270	270	—
70	Lloyd's (N.Y.)	37	35	—	3	3	—	283	283	—
71	Bargain Town (Ala.)	37	35	—	40	40	2	820	820	36
72	Matco (Mo.)	35	34	—	15	15	—	365	365	—
73	Wonder World (Nev.)	34	33	—	4	4	—	440	440	—
74	Shopper's World (Tex.)	34	32	—	43	45	—	1,024	1,071	—
75	Treasure City (N.Y.)	33	31	—	13	10	—	535	412	—
76	Kingsway (Mich.)	31	30	—	2	2	—	247	247	—
77	Mars (Mass.)	30	27	0.3	7	7	—	415	415	—
78	Jack's (Ill.)	29	26	—	6	6	—	215	215	—
79	Magic Mart (Va.)	28	24	—	9	10	1	310	345	35
80	J. A. Conley (Ohio)	26	25	—	12	13	2	320	347	50

Chains included on this list are multiunit operators with corporate sales in excess of $25 million.

**Some figures are DSN estimates. Projected sales are for discount stores' general merchandise only, and don't include supermarket sales.*
[a]7Volume includes U.S. and Canadian K marts; earnings are for entire corporation, including variety and specialty stores.
[b]7Operating income.
[c]7U.S. Woolco only.
[d]7Sales and earnings include volume from variety stores.
[e]7Operating under Chapter XI.